workday.

Change Job

This document contains instructions in the following areas for working with (**Change Job**):
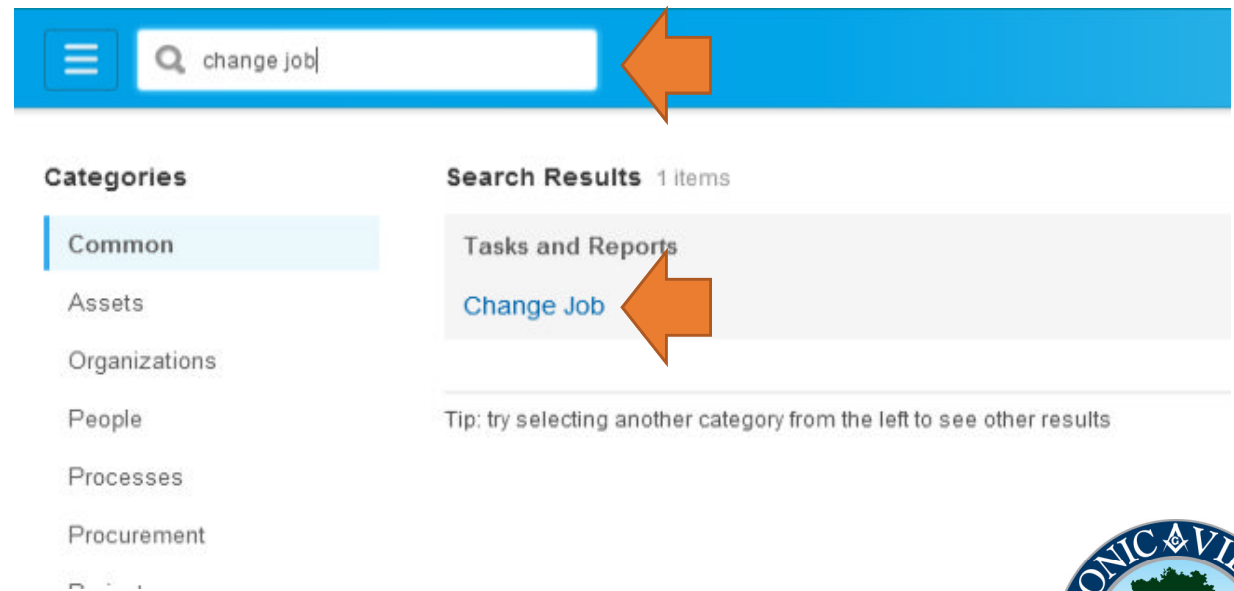
workday.

Change Job is the new process in Workday for changing almost anything about the employee that is job related. Change Job encompasses everything from transfers, to location changes, to hourly changes (part-time to full-time etc.), and even compensation changes.
This process will also be manager self-service which means managers can now initiate the processes themselves and have more control over their employees under their supervisory organization.

These slides are broken into Two (2) main sections.
1.) Changing hours and rate of pay.
2.) Transfers and how to change jobs and organizational assignments.

To initiate a Change Job type the command in the search bar, then click the blue link below.

Q change job

Categories

Common

Assets

Organizations

People

Processes

Procurement

Search Results 1 items

Tasks and Reports

Change Job

Tip: try selecting another category from the left to see other results

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1 Type in the name of the worker under which the change is occurring. Then click OK.

Change Job

Worker * Peter Pan

OK   Cancel

2 The very first step of changing a job will be to determine who the manager will be after this change. If a current employee under your supervisor organization is moving to a different manager. This is where that information would go. If they are changing managers the manager who currently has the employee (you) must initiate the change for the receiving manager to process the rest of the transfer.

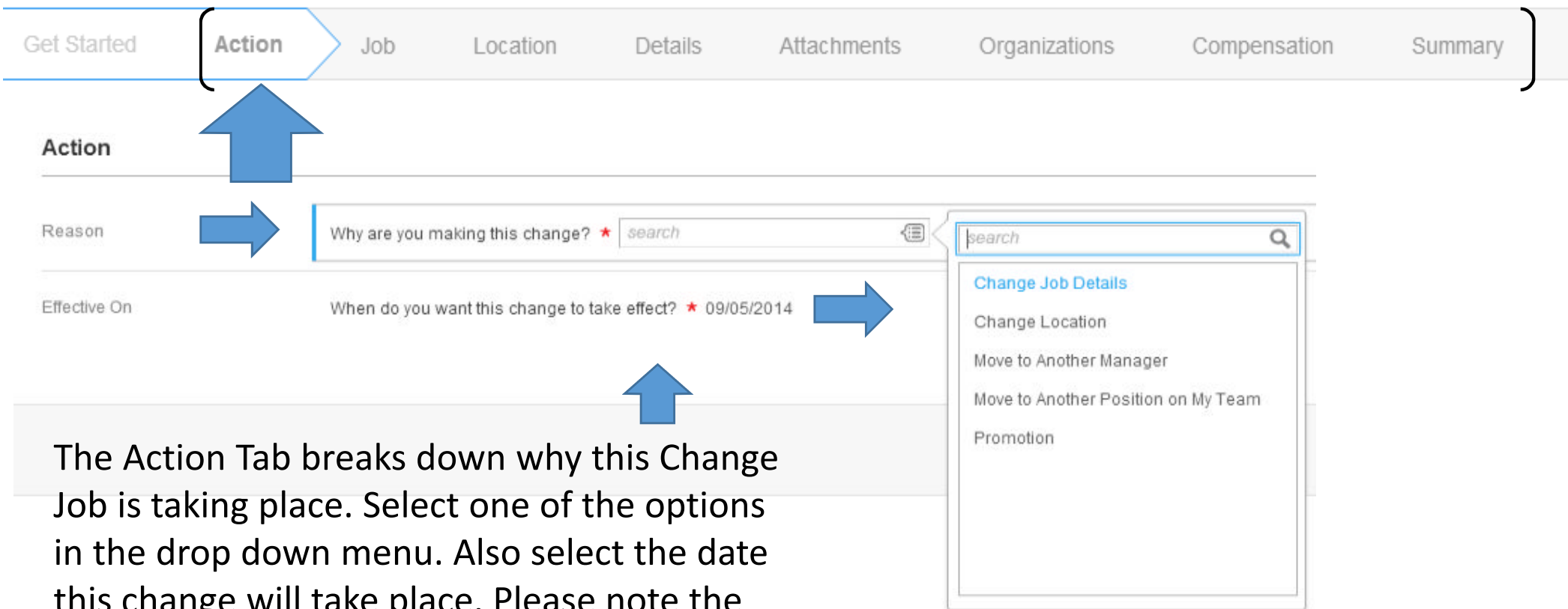| Who will be the manager after this change? | * | search | Undo |
		✗ Maleficent Snow	
Which team will this person be on after this change?	*	Neverland (Maleficent Snow)	
Where will this person be located after this change?	*	Elizabethtown	

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The Change Job process is now broken down into simple steps, each one with a different process that may or may not need changed. See bar below

Change Job **Peter Pan** ⋯

| Get Started | Action | Job | Location | Details | Attachments | Organizations | Compensation | Summary |

Action

| Reason | Why are you making this change? ★ | search | | search |
| Change Job Details |
| Change Location |
| Effective On | When do you want this change to take effect? ★ 09/05/2014 | Move to Another Manager |
| Move to Another Position on My Team |
| Promotion |

The Action Tab breaks down why this Change Job is taking place. Select one of the options in the drop down menu. Also select the date this change will take place. Please note the default date is the next pay period. Remember <u>Workday is very date driven</u>. Make sure the date you enter is correct.

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The 'Job' section is where changes can be made if the job position is actually being changed. For example if a Server was moving to a CNA position, this screen is where that change would take place. For this example no change will take place. Click next to continue.

Please note:
When making a Change Job, be sure to keep the current position open. For example if you were to change this Server to a CNA, there would still be a need for that Server position to be filled, just as their was a need for the CNA position to be filled. Be very careful about "Closing a current position".

Job

Position	Position	Server
	Close the current position?	No
	Is the current position available for overlap?	No
Job Profile	Job Profile ★ Server	
	Job Title Server	
Business Title	Business Title Server	

Back   Next

The 'Location' Tab is where you have the option to do several things:
1.) Change the location of the job (E-town, Sewickley etc.).
2.) Work Space: The physical location where employee works.
3.) Scheduled Weekly Hours: How many hours this employee works per week.
4.) Work Shift: What shift this job holds (Day, evening night etc.).

For this example, if the employee is changing from a Part-time Casual position to a Regular Full-time position on the 'Day Shift', the 'Location' and 'Work Space will not change because the employee is not physically moving to a new location.
Please note that almost all Full-time employees will be scheduled 40 hours a week.
Reference your Employee Type/Time Type Table for the Schedule Weekly Hours

Location

Location Details		
	Location	★ Elizabethtown
	Work Space	Elizabethtown > Clubhouse > Clubhouse Dining Room
	Scheduled Weekly Hours	10
	Work Shift	Evening (United States of America)

1 Please <u>do not edit</u> job classifications. These will be changed by Human Resources and the Payroll Department

2 This section is where attachments can be added. For example CNA, or RN licenses can be added on this step either as an attachment or entered manually.

Details

Job Classifications   *Additional Job Classifications*

Attachments

Documents   ⊕

3 The 'Organizations' section is where the Cost Center and or Business Unit may be changed. The Cost Center is the old 'HCS Dept. #' with the first '6' being replaced with 'CC'.
Please reference the Cost Center /Business Unit Breakout Table

Organizations

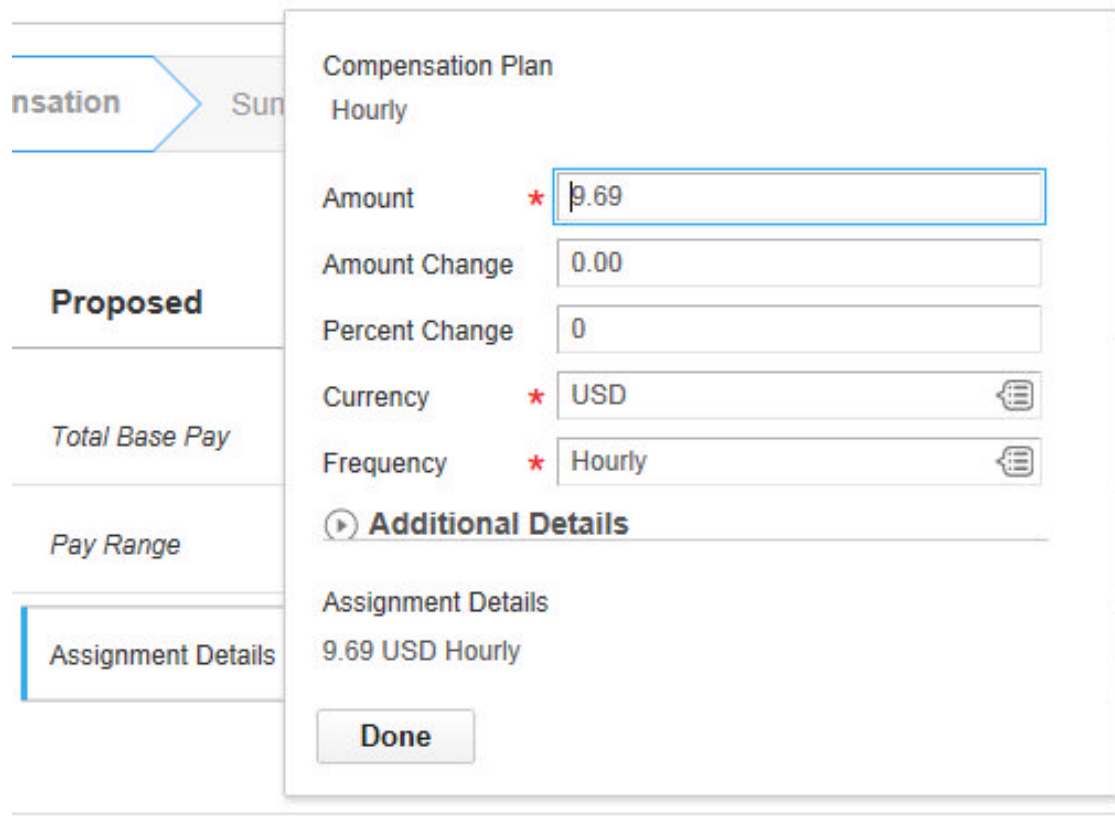|	
Company	Company C01 Masonic Villages of the Grand Lodge of Pennsylvania
Cost Center	Cost Center ★ CC392 Dining Room - RLC
Region	Region R01 Elizabethtown
Business Unit	Business Unit 050 Retirement Living

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This section now allows you to change the rate of pay if applicable. To change the rate of pay click on the 'Pencil & Paper' icon to the right. Please note the 'Pay Guidelines' cannot be edited here. Only the 'Hourly' rate of pay may be changed. Human resources will change the 'Pay Guidelines' if necessary.

Compensation	Current					Proposed
Total Base Pay	Total Base Pay	9.69 USD Hourly				Total Base Pay
Guidelines	Pay Range	9.69 - 9.69 USD Hourly				Pay Range
Hourly	Assignment Details	9.69 USD Hourly	Plan Name	Hourly	Effective Date	08/28/2014	No Change
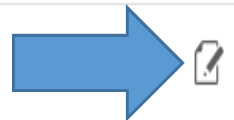
Once clicking the edit button this screen will appear. Change the 'Amount' if applicable. Please note that once a new amount is entered the 'Amount Change' and "Percent Change' will adjust automatically. Click "Done" when finished.

Compensation Plan
Hourly

Amount	*	9.69
Amount Change		0.00
Percent Change		0
Currency	*	USD
Frequency	*	Hourly

Additional Details

Assignment Details

9.69 USD Hourly

Done

nsation   Sun

Proposed

Total Base Pay

Pay Range

Assignment Details

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Once compensation is completed the final screen will show all of the previous steps completed on one page. Please verify that everything is correct then click 'Submit' at the bottom of the screen.

Change Job Peter Pan ⋯

Get Started

Team	Who will be the manager after this change?	Maleficent Snow
	Which team will this person be on after this change?	Neverland (Maleficent Snow)
	Where will this person be located after this change?	Elizabethtown

Action

| Reason | Why are you making this change? ★ Change Job Details | |
| Effective On | When do you want this change to take effect? ★ 09/05/2014 | |

Submit

Congratulations! You have successfully completed a Change Job for your employee, by changing their scheduled weekly hours and work shift. Now Human Resources will review this information and follow up with the applicant to discuss Benefits. Remember the change will only take place in Workday once the date you entered for the change job has been reached.

You have submitted **Data Change: Peter Pan** ⋯

Up Next

HR Partner II

Review Change Job

Due Date   08/30/2014

⊙ **Details and Process**

Done

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Questions or Comments?

For the next section of slides we will go through how to Transfer employees.

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Now we will walk through the steps of how to perform a transfer within the Change Job function.

To begin the transfer of the employee, type Change Job into the search bar and click the link below
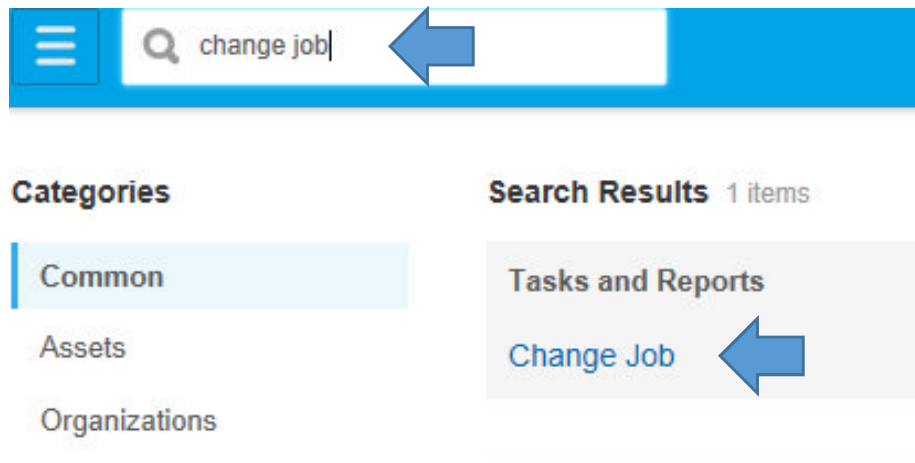
You can also type the employee's name in the search bar and use the related actions beside the employees name to perform a Job Change.

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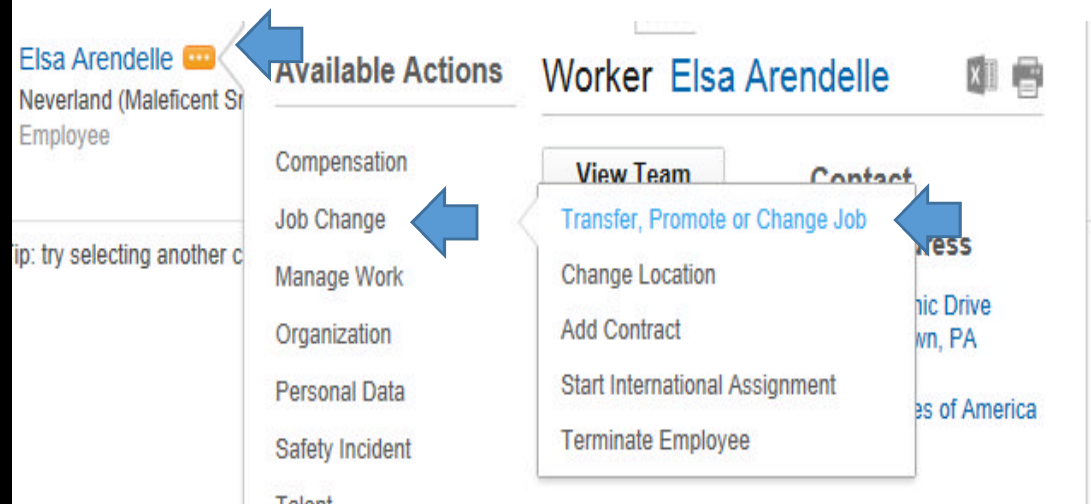
For a transfer begin by typing in the new manager's name after this change takes place. Once selected the other two boxes will change automatically. Click 'Start' to begin.

Get Started

Team

| Who will be the manager after this change? | * | King Stefan |
| Maleficent Snow |
| Which team will this person be on after this change? | * | Neverland (Maleficent Snow) |
| Where will this person be located after this change? | * | Elizabethtown |

Get Started

Team

Who will be the manager after this change?   * King Stefan

Which team will this person be on after this change?   * Nursing-ben Franklin 3 (King Stefan)

Where will this person be located after this change?   * Elizabethtown

Start

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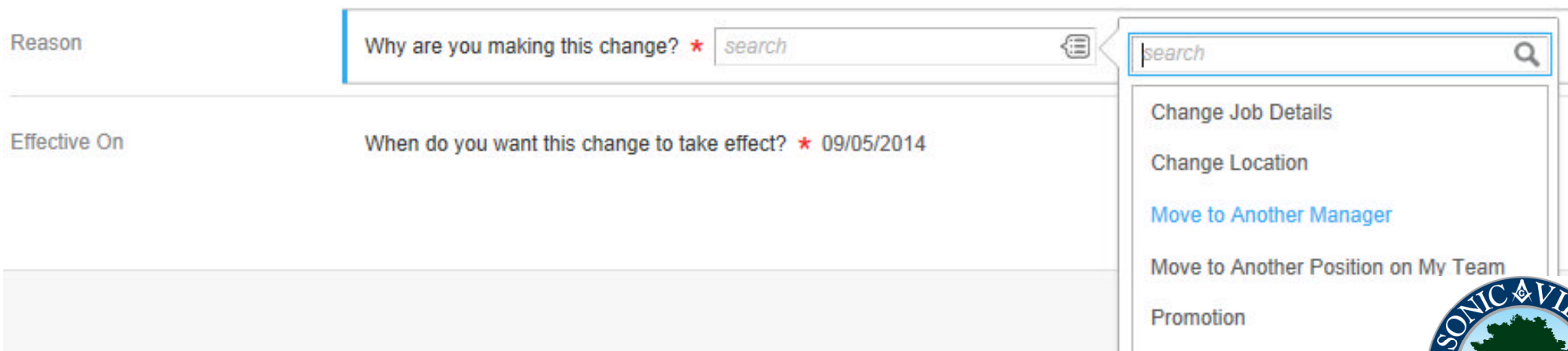
Please note the top of the screen which lists all the steps that need to be completed. This list is much shorter than the one completed before. That is because when transferring an employee the Current manager begins the process and the Receiving manager finishes the steps.
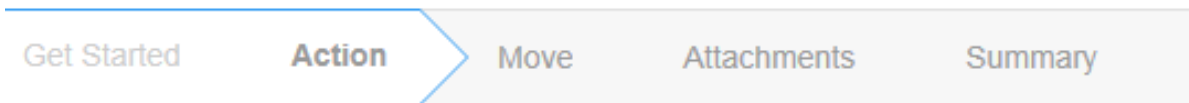
Begin by choosing a reason for making the change. For transfers the reason is "Move to Another Manager". Next, please be sure to put the effective date for when this change is taking place. Remember Workday is very date sensitive. So please be sure it is correct.

1

The following steps will now let you determine what to do with the position that the employee is leaving. <u>In almost all cases</u> please "Backfill this headcount". This will leave the current position the employee is leaving open to be filled by another New Hire or Transfer. Check the overlap box if two employees will be able to fill the same position for a short period of time. (Not a normal action)

Move

Opening

What do you want to do with the opening left on your team? ***** | I plan to backfill this headcount ▼

Is this position available for overlap? ☐

The 'Attachments' sections is where you can add any necessary ID's, licenses etc. By attaching them or manually entering them by clicking the '+' sign.

2

Attachments

Documents (+)

File | **Attach** | Document Category ***** | search

Comment

Updated By (empty) Upload Date (empty)

search

Top > By Subclass > Document Category

Address Verification

Compensation

Contingent Worker Contract
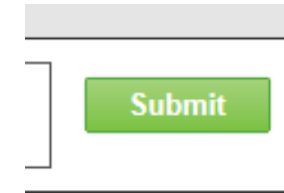
Education Reimbursement

Employment Eligibility

Hire

HR Forms and Documents

ID Verification

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Once completing the attachments page the final page will give an overview of everything that has been changed. Please review the information then click 'Submit' at the bottom of the screen.

Now because this is a transfer, the <u>Receiving</u> manager will complete the rest of the information for the employee, such as "Scheduled Weekly Hours", "Location", "Compensation" etc. These are essentially the same steps that were completed before when just changing an employee's scheduled weekly hours. The only difference being, because this is a transfer two managers will now split the different tasks.

You have submitted **Transfer: Elsa Arendelle** ...
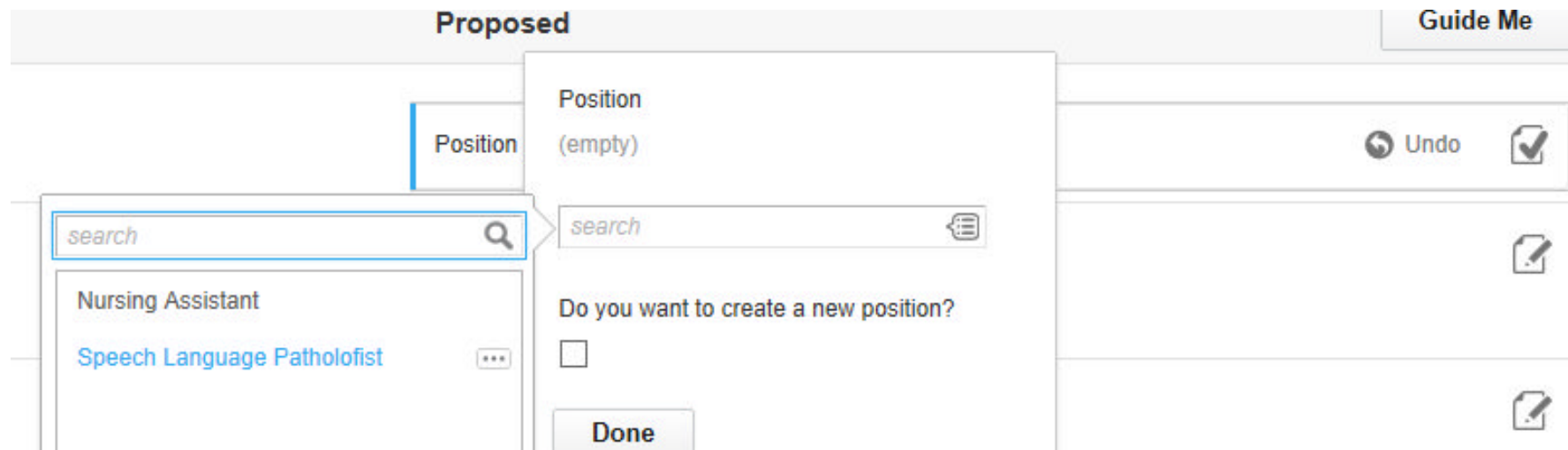
Up Next

King Stefan

Review: Receiving Manager
Due Date   08/30/2014

⊕ **Details and Process**

Done

workday.

In the Receiving Manager's screen it will now list everything the employee currently holds with all of the Proposed changes. Please go through each step and verify everything is correct. Click the 'Pen & Paper' edit icon to make changes when necessary. Under the 'Job' category click 'Position' and that will bring up the open positions for that supervisory organization. Please note that if no jobs show up then there are currently no open positions with that organization.

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Under the 'Location' section please be sure to change the 'Work Space' when transferring an employee. Remember, the work space is the physical location where the employee will be working. Also be sure to change the 'Scheduled Weekly Hours' and 'Work Shift' if applicable.

Please remember do not change 'Job Classifications' Human Resources will take care of this section.

Details	Current	Proposed	Guide Me
Job Classifications	Additional Job Classifications	No Change	✎

The Receiving manager will also make changes to the Hourly Rate of pay if necessary. Human Resources will change the 'Pay Guidelines if they need to be changed. Click 'Submit' at the bottom of the screen once everything is complete.

Compensation	Current	Proposed	Guide Me
Total Base Pay	Total Base Pay	Total Base Pay 33.00 USD Hourly	
Guidelines	Pay Range	Pay Range 29.48 - 44.22 USD Hourly	
Hourly	Assignment Details | Plan Name | Effective Date	Assignment Details 33.00 USD Hourly | Plan Name Hourly | Effective Date 09/05/2014	✎

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Congratulations!!! Once you have reviewed the information and clicked "Submit" this screen will pop up and Human Resources will review the information. Once reviewed, Human Resources will approve the transfer and the process is complete. Remember the change will not take effect in Workday until the effective date that was entered has been reached.

Success! Event approved Transfer: Elsa Arendelle ⋯

Up Next

HR Partner II

Review Change Job
Due Date 08/30/2014

⊙ **Details and Process**

Done

We have gone over many of the steps that encompass Job Changes.
From transfers, to status changes, to location changes, and how to
change compensation.
This is now initiated by the Manager which will give you more
control over your employees and make the process move much
more quickly than before.

Do I still have to fill out Activity Sheet/Change Forms?
Why that is a great question! No you do not!
Those forms are no longer necessary because all that information is already in
Workday. WOW!

Questions or Comments?